

**Indiana
Physicians
Health
Alliance**

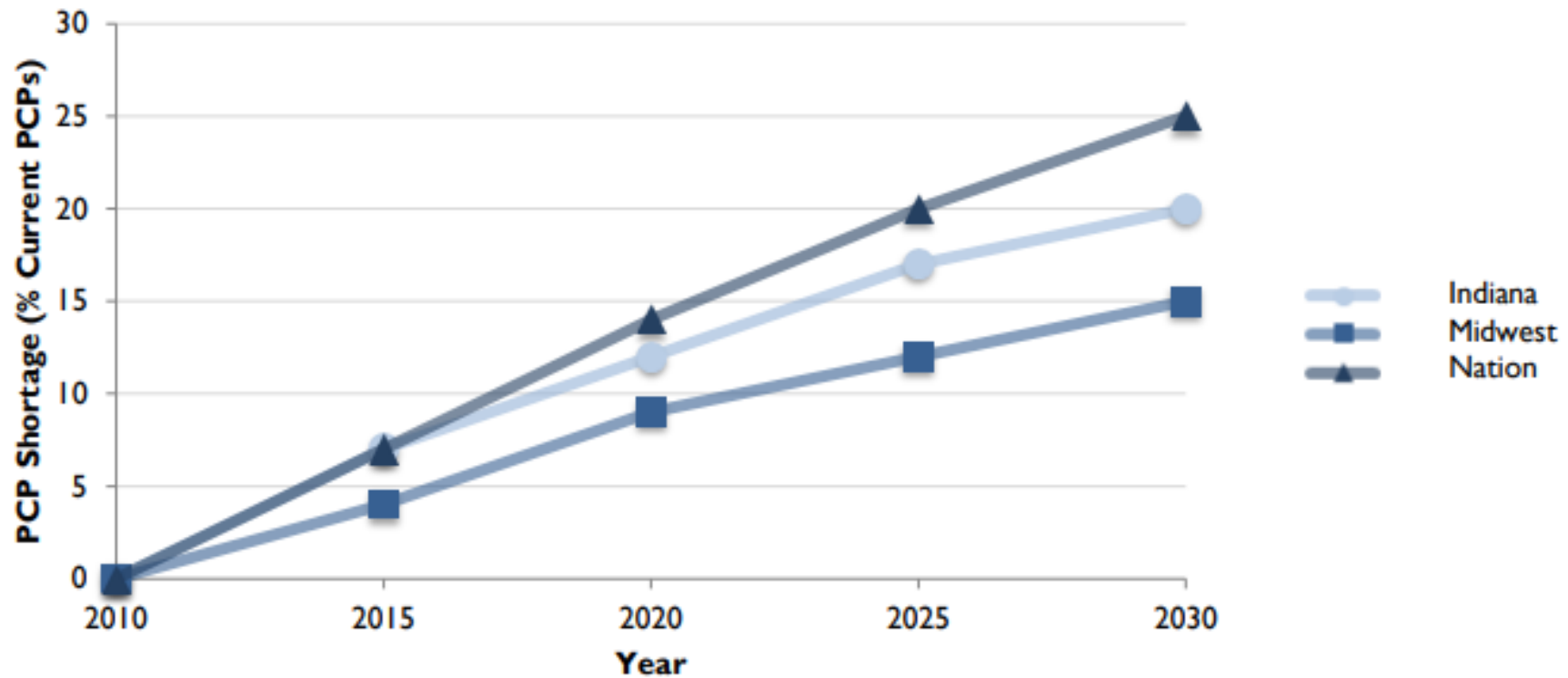
Employers' Forum of Indiana

November 2, 2023

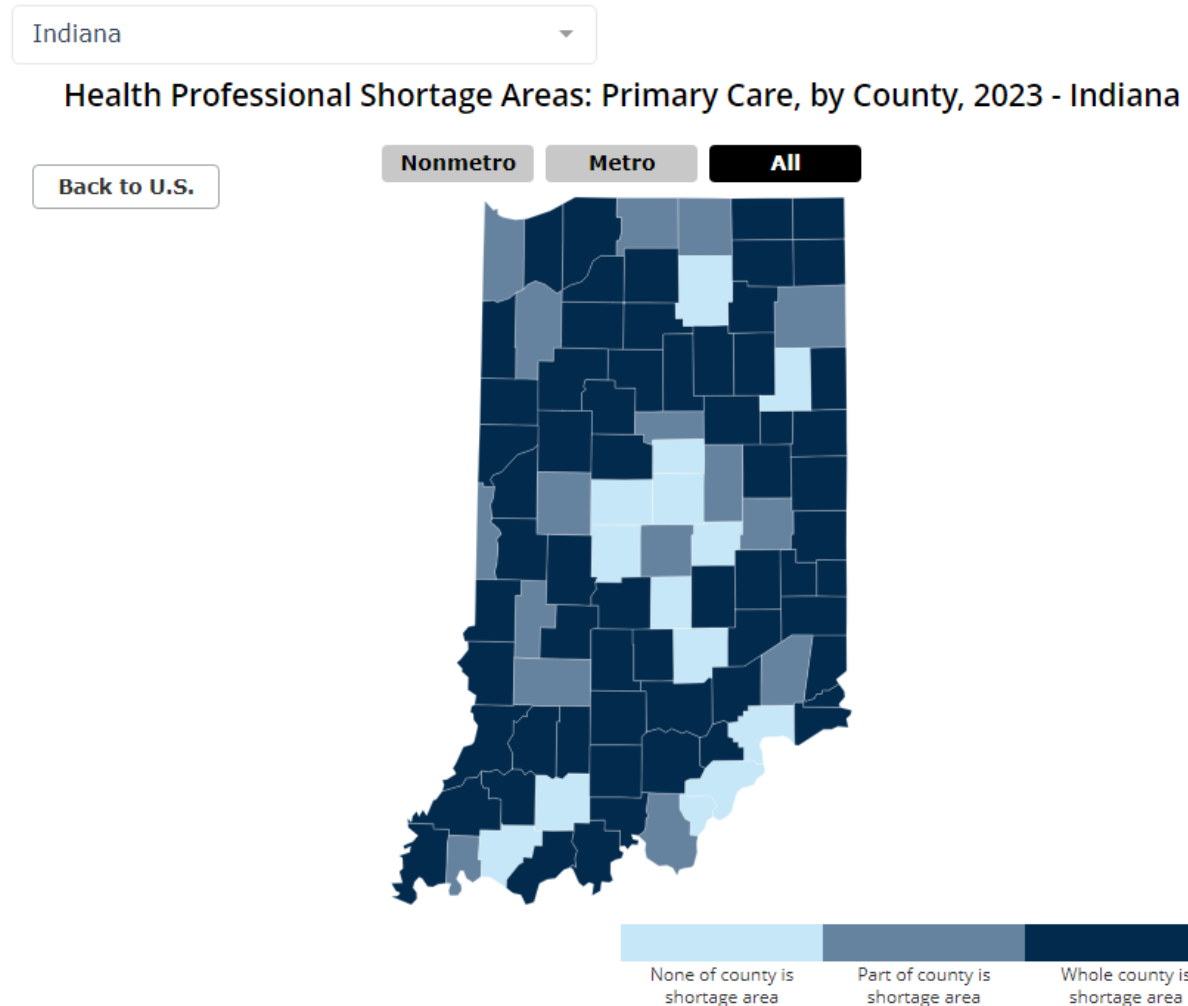
Linda Wilgus
Executive Director
Northwest Radiology Network PC

Does Indiana have a physician access issue?

Physician Demand Comparison - State, Region, Nation



Shortage of Primary Care Physicians by County



How does Indiana rank for Healthcare?

The Worst States for Healthcare

Search in table

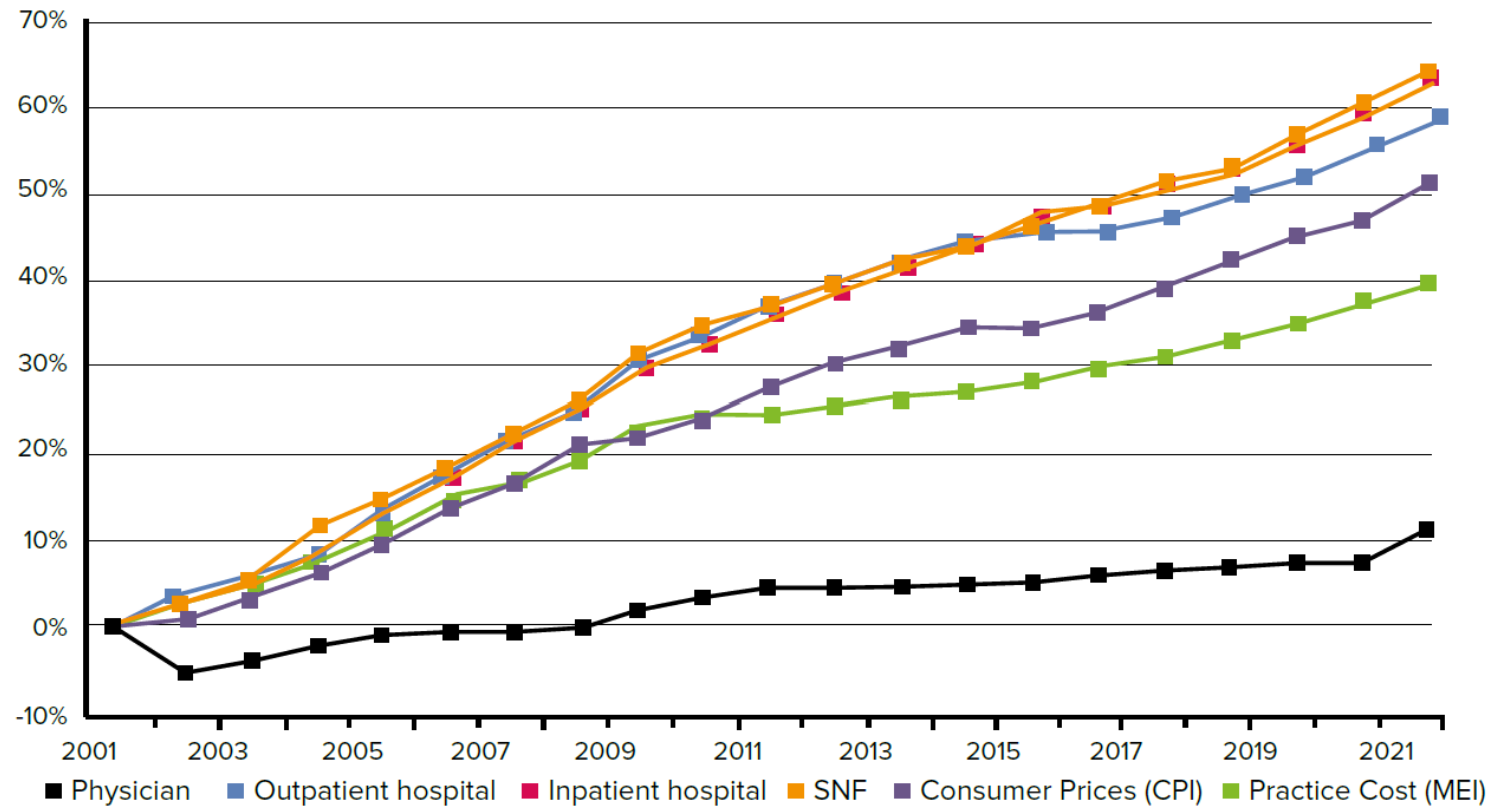
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Rank	State	Healthcare Access Score ¹	Healthcare Outcomes Score ²	Healthcare Cost Score ³	Quality of Hospital Care Score ⁴	Overall Score
1	Georgia	80.87	68.70	94.04	76.42	100.00
2	Alabama	65.88	85.11	79.64	48.62	87.03
3	North Carolina	60.49	75.57	100.00	54.40	85.95
4	Mississippi	62.08	100.00	54.80	48.52	84.70
5	South Carolina	72.01	67.94	88.91	42.84	83.50
6	Arkansas	59.90	95.04	63.74	44.85	82.39
7	New Mexico	74.04	51.53	61.42	100.00	82.17
8	Texas	85.60	51.91	86.59	34.89	81.60
9	Nevada	99.67	50.38	33.77	53.95	79.08
10	Indiana	66.17	74.43	85.76	31.02	79.01



Physician reimbursement trends

Medicare Updates Compared to Inflation (2001-2021)

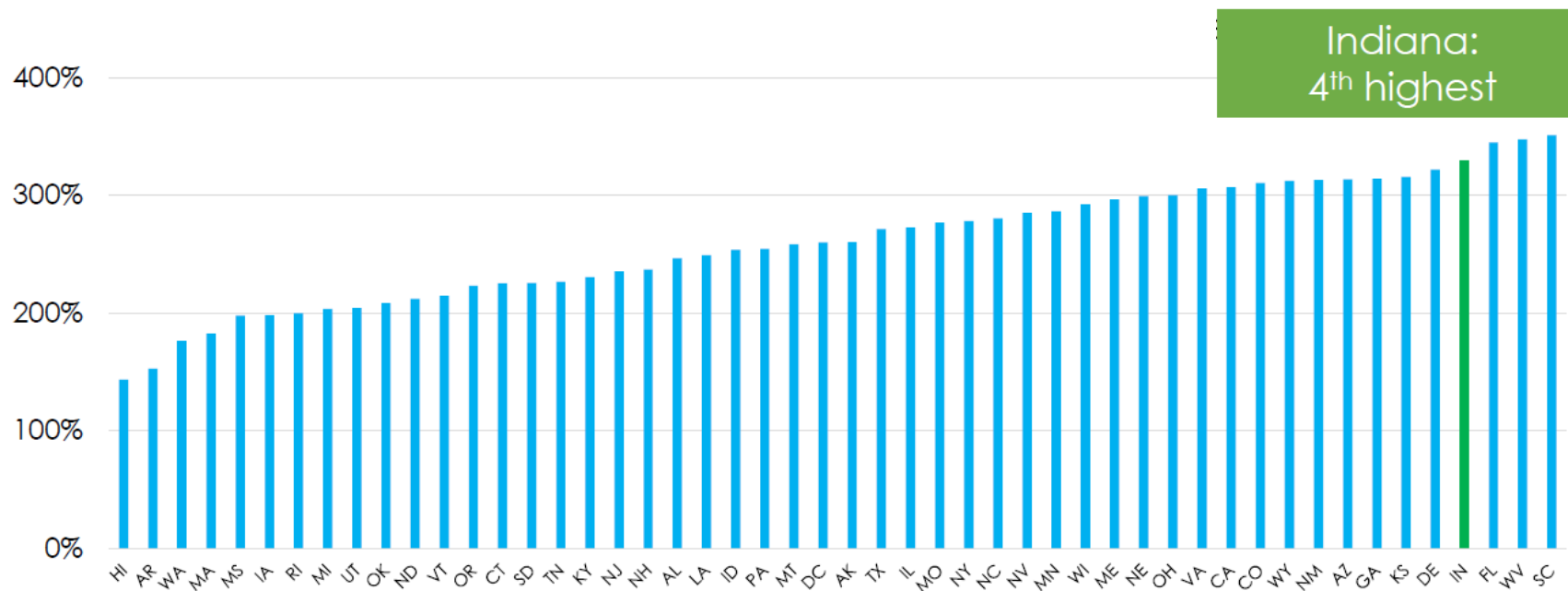


Sources: Federal Register, Medicare Trustees' Reports and U.S. Bureau of Labor Statistics

RAND Studies – Hospital

Indiana facility prices are high relative to Medicare

Inpatient and Outpatient Relative Facility Prices



RAND Studies – Physicians

Indiana professional fees are low relative to Medicare





Noted in this article:

- By the end of 2020, nearly 70% of physicians reported being employed by hospitals or corporations.
 - Year-over-year cuts from Medicare Reimbursement
 - Rising inflation and cost pressures to run a private practice
 - Regulatory burden
- Health Affairs (Whaley) reports .8% drop in physician income after their practice was acquired
- The most concentrated markets where physicians are employed by health systems fees are 14 to 30% higher than in least concentrated markets. (*The Journal of Law & Economics*)
- Regional industry consolidation, where large systems buy up most competition, also curbs competition.
- “Consolidation also means physicians lose autonomy, and despite being high-quality, low-cost providers, the shrinking market can make it tougher for independent physicians to compete with large organizations for referrals and payer contracts.”

Indiana General Assembly Health Care Cost Oversight Task Force

Role of consolidation

The drivers of high and variable prices:

It all comes down to **market power**

Market power is amassed through **consolidation** (mergers, vertical consolidation, joint ventures)

The vast majority of hospital markets and specialty physician markets are **highly concentrated**



Indiana Physicians Health Alliance Forms

Coalition seeks bargaining power for independent physicians

September 8, 2023 | John Russell

KEYWORDS [DOCTORS](#) / [HEALTH CARE](#) / [HEALTH CARE & LIFE SCIENCES](#) / [HEALTH CARE COSTS](#) / [LOBBYISTS](#)

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Dr. Vincent L. Flanders examines images at [Northwest Radiology Network](#). The Indianapolis-based group of about 30 radiologists is a member of Indiana Physicians Health Alliance Inc. (IBJ photo/Eric Learned)

Our Mission and Strategic Outlook

Indiana Physicians Health Alliance

CONSUMER CENTERED HEALTHCARE

www.indianaphysicianshealthalliance.com

Mission

We are dedicated independent private practice physicians prioritizing affordable, value-based and transparent healthcare. Our purpose is to provide highest quality at a lower cost healthcare. Our goal is to reduce or remove low value barriers to healthcare delivery and accessibility by adding value to and strengthening relationships directly with healthcare consumers.

Healthcare Cost-Quality Collaboration

We welcome all healthcare policy advocates, employers, primary care and specialty care providers dedicated to be stewards of modern healthcare delivery. Please reach out to us via

Cindy Kirchhofer Cindy@indianaphysicianshealthalliance.com

Strategic Outlook

- Define independent healthcare providers as the premier consumer choice for care
- Participate in Indiana healthcare policy supporting highest quality care delivered at an affordable cost
- Build employer-provider partnerships
- Support direct contracting with employers
- Data-driven demonstration of independent providers' economic value



Who are We?

Represent 22 Physician groups across all of Indiana,
comprising 550+ total Physicians

Specialties Include:

- Orthopedics
- Surgery
- Anesthesia
- Radiology
- Cancer Care
- Direct Primary Care
- Ophthalmology
- Dermatology
- Urology
- Vascular Surgery
- Behavioral Health
- Ambulatory Surgery Center
- Neurology

We are NOT?

We are not anti-hospital nor anti-hospital employed physicians.

We are truly independent, physician-owned, private practices that allow for a more patient-focused environment that is not profit-driven.

Strategies & Initiatives for IPHA

Initiatives:

- We look to support other IPHA members through networking and sharing of best practices.
- Referrals are steered to IPHA members where high quality care is provided at affordable prices.
- We seek discussions with employers on direct contracting.
- We look forward to engaging with payors on cost/risk/care alignment strategies.
- We offer solutions/resources to support physicians who want to transition to private practice.
- We will educate employers/consumers on the benefits of physician owned physician led healthcare.
- We will advocate for favorable legislation that will help sustain the independent physician.

Indiana Physicians Health Alliance Members

1. Cancer Care Group
2. Elkhart Clinic
3. Evansville Surgical
4. Fort Wayne Dermatology Consultants, Inc.
5. Fort Wayne Medical Oncology & Hematology
6. Freedom Healthworks
7. Goodman Campbell Brain And Spine
8. Indiana Hand to Shoulder Center
9. Indiana Health Group
10. Indiana Spine Group
11. JWM Neurology
12. Meridian Medical Services
13. Anesthesia Services, LLC
14. Northwest Radiology
15. OrthoIndy
16. Orthopaedics Northeast
17. Price Vision Group
18. Radiology of Indiana
19. WellBridge Surgical
20. Alexander Choi MD
21. John McGoff MD
22. Ron Piniecki MD